

NEW RESIDENT MOVE-IN CHECKLIST

A practical provider checklist for preparing before move-in, staying organized on move-in day, and following up during the first week.

BEFORE MOVE-IN: FIT & CARE NEEDS

- Required assessment or screening completed, as applicable
- Provider has determined it can safely meet the resident's needs
- Mobility and transfer needs understood
- ADL assistance needs understood
- Cognitive, dementia, behavioral, and safety needs reviewed
- Nighttime assistance needs understood
- Dietary needs, allergies, and preferences documented
- Nursing, hospice, home health, or medical-equipment needs reviewed

BEFORE MOVE-IN: RECORDS & MEDICATIONS

- Admission documents completed as required
- Current medication list and orders reviewed
- Recent medication changes clarified
- Pharmacy arrangements confirmed
- Diagnoses and relevant medical history received
- Physician / health-care provider information confirmed
- Emergency and authorized family contacts confirmed
- Advance directive, POA, guardianship, or other relevant documents received, if applicable

BEFORE MOVE-IN: PERSON & HOME

- Preferred name and communication needs known
- Daily routines and sleep schedule discussed
- Favorite foods, dislikes, interests, and meaningful activities discussed
- Triggers, fears, calming strategies, and important personal history shared
- Cultural, language, spiritual, or religious preferences discussed
- Room cleaned and prepared
- Needed equipment arranged
- Safe pathways, lighting, and accessibility reviewed
- Care team briefed before the resident arrives

MOVE-IN DAY

- Resident personally welcomed by name
- Caregivers introduced
- Room and important areas explained
- Belongings organized and familiar items placed
- Medications handled according to applicable requirements
- Immediate care needs reconfirmed
- Primary family contact and communication expectations reviewed
- After-hours contact process explained
- Resident given time and space to settle

FIRST 24 HOURS: OBSERVE

- Actual mobility and transfer needs
- Eating, hydration, and dietary tolerance
- Toileting and continence needs
- Whether the resident asks for help when needed
- Confusion, anxiety, behaviors, or safety concerns
- Response to caregivers and new surroundings
- Nighttime routine and assistance needs
- Medication-related concerns

FIRST WEEK: REVIEW & FOLLOW UP

- Compare actual care needs with pre-admission information
- Review adjustment, mood, sleep, eating, and hydration
- Address differences in mobility, transfers, cognition, or nighttime needs
- Update care/service plan when appropriate and required
- Communicate meaningful observations with authorized family contacts
- Follow up on unresolved medication, equipment, or clinical questions
- Ask the family whether they have concerns or new information
- Address problems early rather than waiting for a crisis

NOTES & FOLLOW-UP

FOLLOW-UP ITEM	RESPONSIBLE PERSON	DATE / STATUS

Remember: A successful move-in is a process, not a single day. Prepare the team, welcome the person, observe carefully, communicate, and adjust as you learn what the resident actually needs.

A provider resource from Ovella Living | Good care deserves to be found.

Educational resource only. Assessment, admission, medication, documentation, care-planning, staffing, privacy, and other requirements vary by state, license type, payer, and resident circumstances. Follow the requirements applicable to your setting and jurisdiction.